

PRELIMINARY 2018 ECONOMIC IMPACT

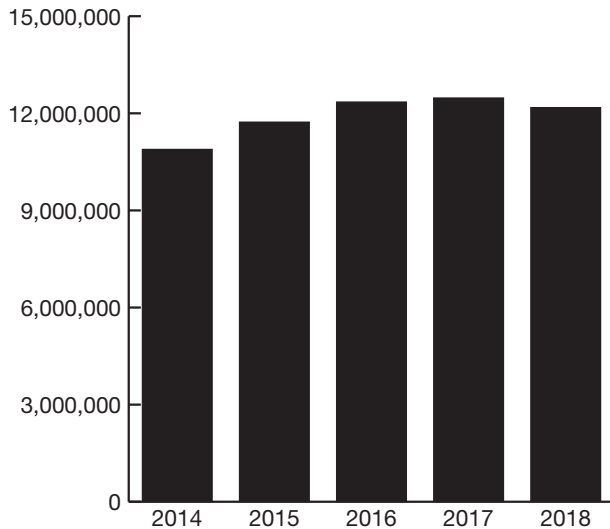
Tourism is one of Montana's leading industries. Non-resident visitors add money to the state's economy, supporting jobs and reducing state and local taxes for Montana residents. The Montana Office of Tourism and Business Development (MOTBD) at the Department of Commerce markets Montana to maximize non-resident spending.

ECONOMIC IMPACT PROFILE (VS. 2017)*

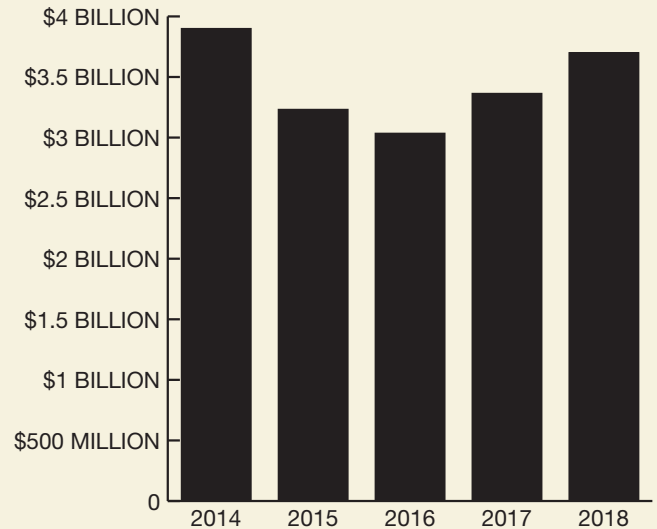
Non-resident Visitation: 12.2 Million (-2.4%)
Non-resident Spending: \$3.7 Billion (+10%)
Jobs Supported: 58,800 (+10.2%)
Salaries: \$1.5 Billion (+10.5%)
State & Local Taxes: \$227.5 Million (+11.3%)



NON-RESIDENT VISITATION, 2014-18



NON-RESIDENT SPENDING, 2014-18*



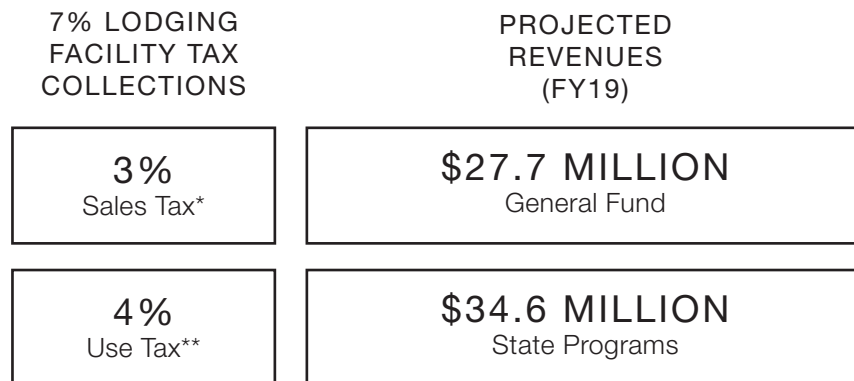
2018 Spending by Category

Gasoline, Diesel	\$848,380,000
Restaurant, Bar	\$660,340,000
Hotel, Motel	\$438,430,000
Outfitter, Guide	\$394,640,000
Retail Sales	\$354,430,000
Groceries, Snacks	\$272,020,000
Licenses, Entrance Fees	\$265,710,000
Auto Rental	\$145,820,000
Rental Cabin, Condo	\$107,790,000
Made in Montana	\$91,450,000
Campground, RV Park	\$44,840,000
Vehicle Repairs	\$30,110,000
Misc. Services	\$27,410,000
Gambling	\$12,680,000
Farmers Market	\$6,240,000
Transportation Fares	\$610,000
Total	\$3,700,900,000

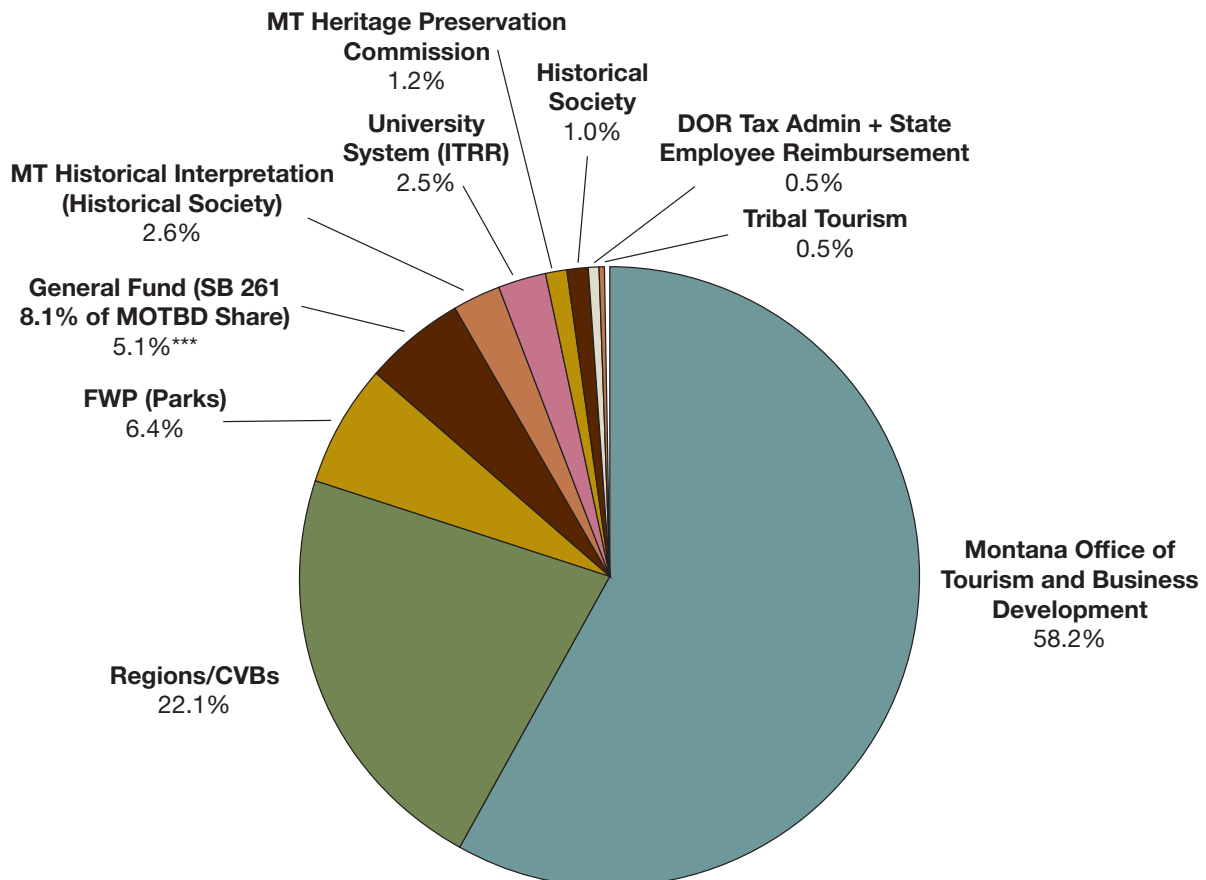
MONTANA PROMOTION FUNDING

Tourism and film promotion is funded through the 4% Lodging Facility Use Tax, commonly known as the “Bed Tax.” Enacted by the 1987 Legislature, the Bed Tax is collected from guests of hotels, motels, bed and breakfasts, guest ranches, resorts, and campgrounds. These funds are divided according to the chart below.

No additional funds come from Montana’s General Fund. In fact, tourism helps to support the General Fund due to the additional 3% Lodging Facility Sales Tax added to the original 4% in 2003.



DISTRIBUTION OF 4% LODGING FACILITY USE TAX



*OBPP 2019 Biennium Revenue Estimate, Page 8-3

**Joe Ramler, Senior Economist, Dept of Commerce 5/22/18

***5.1% of total distribution